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**TO: Economic Support Supervisors
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**FROM: Amy Mendel-Clemens
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BHCE/BWP OPERATIONS MEMO

No.: 03-43

Date: 07/21/2003

Non W-2 ☐ W-2 ☒ CC ☐

PRIORITY: HIGH

SUBJECT: CONFERENCE ON PERSONAL FINANCE

EFFECTIVE DATE: Immediately

PURPOSE

This memo provides information about a special conference on personal finance.

BACKGROUND

The Department of Workforce Development, the Department of Financial Institutions, the Wisconsin Housing and Economic Development Authority and Asset Builders of America have teamed up with other community businesses and social services agencies to offer the third annual "Money Conference: A Conference on Personal Finance".

The Conference is targeted toward low-income families and will offer education and training about credit with speakers from Consumer Credit Counseling Service, The Consumer Federation of America, The Wisconsin Bankers Association, the Tenant Resource Center, The Neighborhood Law Center, the IRS Taxpayer Education Office, Junior Achievement and two young entrepreneurs whose message is to "Build Wealth—Not Debt". There also will be education and training about the importance of money management and what programs and services are available to low-income families that want to start a savings or investing program.

The Money Conference also offers education and training for children and young adults' ages 6 to 18. Children and young adults can learn what investment and financial education programs are available in the community.

Mike Behan, Economics Teacher of the Year winner, will teach youth sessions on the economy entitled "You ARE the System" to help kids understand their place in this economy. In addition to the youth sessions, local youth will display their talent using a financial theme in the "Intelligent Arts Showcase." There also will be investment education for intermediate investors.

CONFERENCE SPECIFICS

The conference cost is \$10 for adults and \$5 per child. It includes a continental breakfast, lunch, program materials and door prizes. Every adult registered is eligible to receive a free credit report-a \$9 value. The conference will be Saturday August 16th at the Alliant Energy Center, 1919 Alliant Energy Way, Madison, Wisconsin. Registration begins at 7:45 a.m.

The Money Conference is an allowable W-2 education and training activity. W-2 agencies are asked to encourage W-2 participants and staff to attend.

If the W-2 agency requires a participant to attend, the following must occur:

1. Necessary supportive services (transportation, child care, payment for registration) need to be provided.
2. The employment plan should reflect the activity.
3. Hours must be considered in the 10-12 hours per week education and training limit.

Registration materials are available to W-2 agencies to distribute to their clients and staff. See the announcement (next page) for a resource.

W-2 supportive services should be used to pay registrations for W-2 clients and to provide transportation and child care.

CONTACTS

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Note: Email contacts are preferred. Thank you.
DWD/DWS/BDS/JO